



Online Budget Submission Quick Start Guide

www.stats.indiana.edu/govtgateway

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to the <u>Department of Local Government Finance</u> ("DLGF") and the <u>State Board of Accounts</u> ("SBOA"). The site was developed and is maintained by the <u>Indiana Business Research Center</u> at Indiana University with DLGF as part of the **Information for Indiana Initiative**, with support from the State of Indiana, Indiana University, and the Lilly Endowment.

This training guide provides a basic "first look" at how to navigate the website, enter information, and submit the information to DLGF.

Information specific to the budget process and the appropriate content for the forms is available through the Budget Manuals, which can be found at the links below:

County: http://www.in.gov/dlgf/2677.htm
Township: http://www.in.gov/dlgf/4952.htm
Cities/Towns: http://www.in.gov/dlgf/4873.htm
Libraries: http://www.in.gov/dlgf/4843.htm

Special Districts: http://www.in.gov/dlgf/4768.htm

Table of Contents	Page
Objectives of Gateway	3
Objectives	3
Why Submit Information Online?	3
Online Access Instructions	4
General Navigation Techniques	5
Filling Out the Forms	6
Select Unit	
Manage Unit (Main Menu Screen)	7
Manage Departments	8
Manage Funds	
Accessing the Forms	11
Entering Data	12
Saving Your Work	14
Signing the Forms	
Official Submission of Forms to DLGF	
Submitting the Signed Ordinance (Form 4)	
Submitting Proof of Advertisement	17
Printing the Forms	18
Mozilla Firefox	
Internet Explorer	21
Where to Go for Help	
Trouble Shooting Guide	23

Objectives of Gateway

Objectives

Provide a web-enabled interface with customized applications for the input of local government unit budget and annual report data. The system will utilize data warehouse technology to store and report out the data to the agencies as well as public data sets to be made available on STATS Indiana.

- Create a State portal for the input of information required by multiple state agencies specifically DLGF and SBOA of local government units.
- Develop tools within the portal specific to the entry of budget data, with resulting data loaded automatically into a data warehouse that will have specially designed reporting utilities.
- Develop tools within the portal specific to the entry of the annual report to be submitted to the SBOA as required by IC 5 11-1-4, tailored to the types of units (county, township, city, town, etc.) and funds. Annual Report data loaded to data warehouse will have specially designed financial reporting utilities

Why submit information online?

The internet and e-mail allow business to be done more quickly and efficiently. Taxpayer money can be saved at both the state and local levels by taking advantage of technology. No more printing costs for all the state forms. No more fuel and postage expense due to transporting boxes of paper from place to place. No more burdensome surveys to fill out for trade organizations.

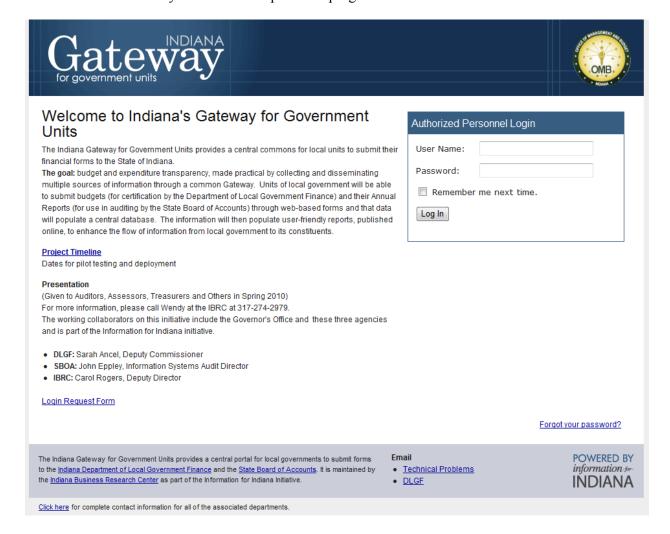
Online Access Instructions

As an authorized user of the Indiana Government Gateway, your Username is your e-mail address. The initial password is **Gateway\$1234** but this should be changed upon first login to something unique and confidential.

Web Address (URL):

www.stats.indiana.edu/govtgateway

Note: If your monitor resolution is "low," the authorized personnel login may appear below the text, so be sure to scroll down if you don't see it up at the top right.

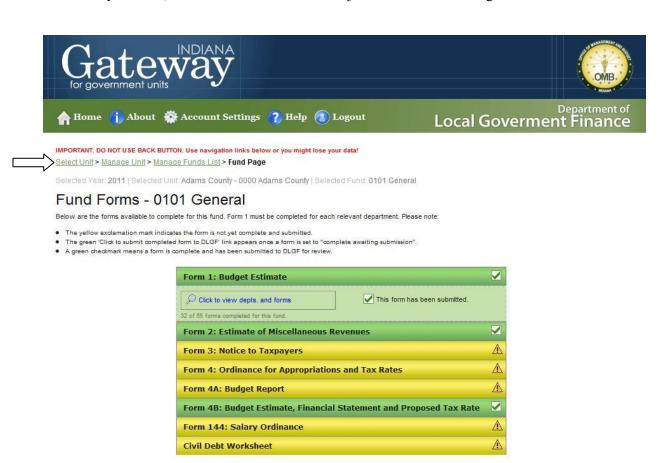


General Navigation Techniques

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms

Any phrase that becomes underlined when you scroll over it can be clicked to take you to a new page in Gateway.

DO NOT use the "Back Button" on your internet browser to navigate through the different pages of Gateway. Instead, use the "Breadcrumbs" found just under the blue and green header bar.



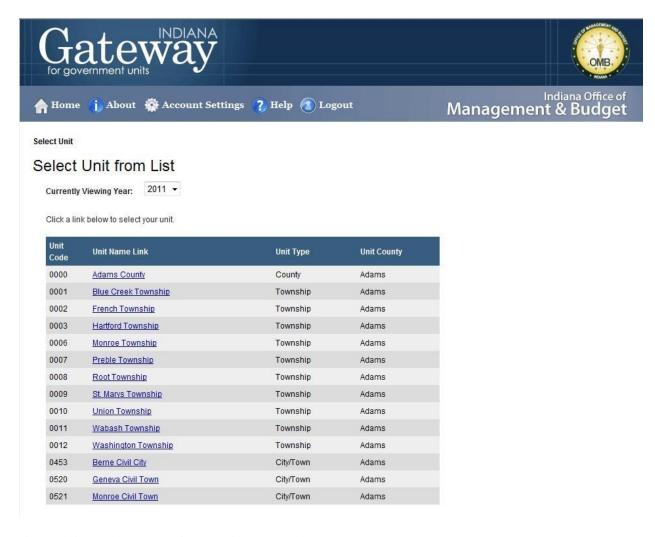
Email

POWERED BY

Filling Out the Forms

Select Unit

Once you log in, a list of units will appear that have been assigned to your user account. For most volunteers, this will be only your unit. Other units may appear if you have been given permission to enter information on behalf of another unit.

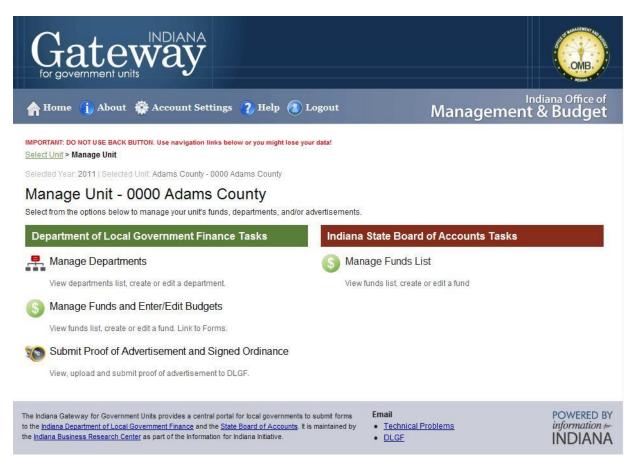


Simply click on the name of your unit to proceed.

Manage Unit (Main Menu Screen)

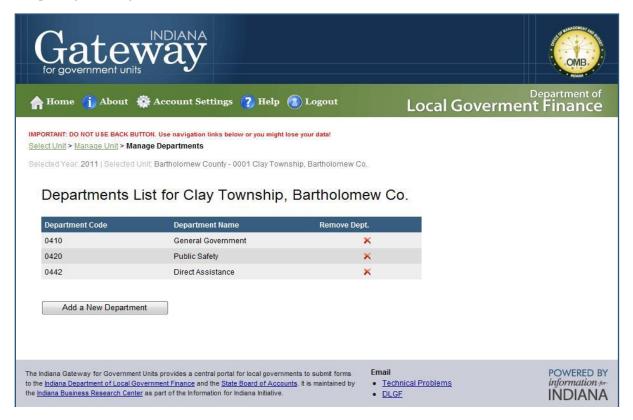
A list of all possible tasks will appear. Focusing on the DLGF tasks on the left-hand side (under the green heading), you can do the following from this menu, which are discussed in more detail on the following pages:

- Manage Funds and Enter Budgets. Within this option, you can edit (if necessary) the funds assigned to your unit and then complete the budget forms for each fund.
- <u>Manage Departments</u>. Within this option, you can edit (if necessary) the list of departments within your unit. You will want to do this before completing the budget forms.
- <u>Submit Advertisements and Ordinances</u>. Within this option, you can upload a PDF or picture file to serve as your proof of advertisement and submit it to the DLGF through Gateway. You will also submit a PDF or picture file of your signed Form 4.



Manage Departments

This task is straightforward – check the departments for your unit and determine if any need to be added or deleted. The departments will be linked to your budget forms, and you will be able to select the relevant department while filling out each form. As a reminder, this should be completed before completing the budget forms.

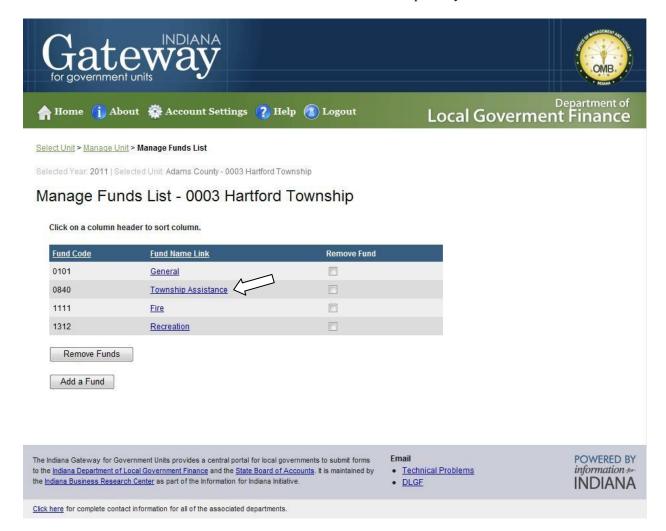


Manage Funds

The Manage Funds area helps you check whether the correct funds are being listed for your unit and make any changes necessary. It is important that the fund list be correct so that you have a set of budget forms for each fund. If a fund is missing, click the "Add a Fund" button at the bottom of the fund list; you will then select the fund from a pre-selected list. If a fund is listed under your unit that does not belong, you can delete it by placing a check mark in the "Remove Fund" area and then clicking the "Remove Funds" button at the bottom of the list.



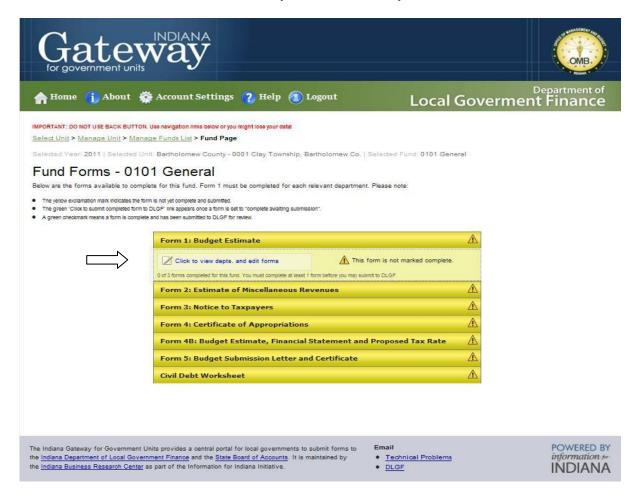
Once you ensure that your fund list is correct, you can then click on the name of the fund in the table (in the column labeled "Fund Name Link") to begin the process of entering the budget forms for that fund. You will need to click on each fund and enter each fund's forms separately.



Accessing the Forms

The first screen you will see gives you the options of forms to enter. It is recommended that you begin your budget process by filling out Form1 and Form 2. Other forms will pre-populate based on the information entered in these forms.

This is what the screen will look like before you have entered any information.



Each form is contained in a row of the table. To access the options for the form, simply click on the row and the options for that form will appear.

To access the forms, simply click the link that says "Click to edit form." That will bring up an empty form. You are now ready to start entering data.

For certain forms that are filled out separately by department, the link will say "Click to view departments and edit form." Clicking this will first take you to your customized department list. After selecting a department, the form for that department will appear. You are now ready to start entering data.

Entering Data

Some data is entered only once. A blank field will indicate that an entry is required.

Prescribed by Department of Local Government Finance Budget Form No. 1 (Rev. 2002) Approved by State Board of Accounts BUDGET ESTIMATE FOR Selected Year: 2011 Selected County: Bartholomew County Selected Unit: 0526 Elizabethtown Civil Town, Bartholomew Co. Selected Fund: 0101 General Selected Dept: 0000 No Department 1. Personal Services Salaries and Wages Items Reference Code Description Approved Add New Record **Employee Benefits** Reference Code Description Approved Add New Record

For much of the data, multiple rows of data will be entered. The form will begin with a single blank row. After you enter the first line of data, click "+Add New Record." The data will appear on the screen and a new blank row will appear underneath. Continue to enter additional rows until the information is complete.



Should you need to edit or delete information that you have already added, you can do this by clicking the "Edit" or "Delete" options next to the line of data.



Saving Your Work

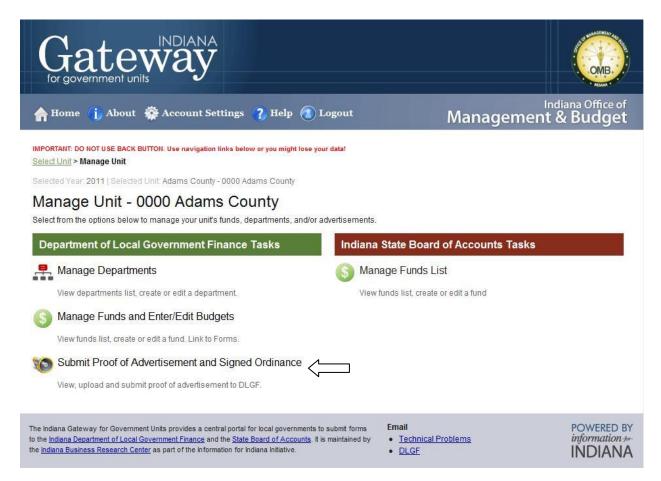
Gateway automatically saves data as it is entered. In other words, each time you click "+Add New Record," that line of data has been saved.

No further action is required until the form is complete and ready to be submitted.

Signing the Forms

Most forms will be submitted with an electronic signature. You will be sent a PIN number in a separate communication from the DLGF. To electronically sign the form, you will need to type your name and title, enter your individual PIN number, and indicate the date signed. This feature will be included on the full rollout of the website, but is not part of the pilot version.

Since the Budget Form 4 is an ordinance, this must be printed and submitted with actual signatures. Therefore, signature lines appear on the form but cannot be completed electronically. The form should be submitted through the "Submit Proof of Advertisements and Ordinance" section under the "Manage Unit" breadcrumb.



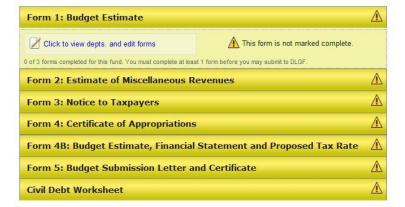
Official Submission of Forms to DLGF

Until you are a finished with a particular form, data will be saved continually but the funds list will indicate that the form is not yet complete.

Fund Forms - 0101 General

Below are the forms available to complete for this fund. Form 1 must be completed for each relevant department. Please note:

- The yellow exclamation mark indicates the form is not yet complete and submitted.
- . The green 'Click to submit completed form to DLGF' link appears once a form is set to "complete awaiting submission"
- A green checkmark means a form is complete and has been submitted to DLGF for review



Once the form is completed and signed, you can indicate its completion by clicking the "Click Here to Mark Form Complete" button. Once you have done this, the option will appear on the funds list for you to submit the form to the DLGF. The status bar will say "Click to submit completed form to DLGF."

Fund Forms - 0101 General

Below are the forms available to complete for this fund. Form 1 must be completed for each relevant department. Please note:

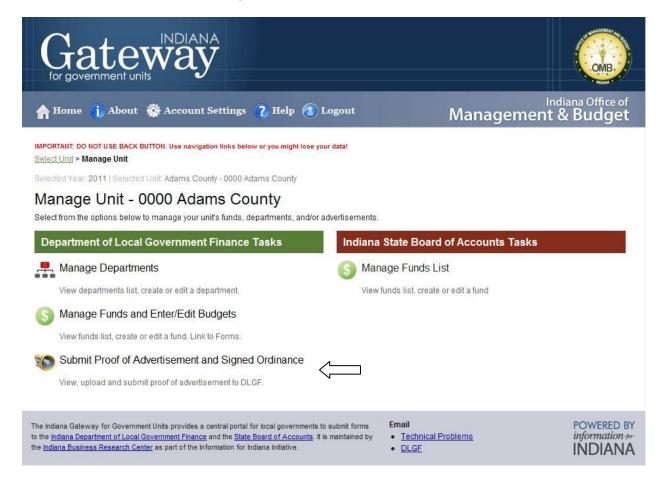
- The yellow exclamation mark indicates the form is not yet complete and submitted.
- The green 'Click to submit completed form to DLGF' link appears once a form is set to "complete awaiting submission"
- A green checkmark means a form is complete and has been submitted to DLGF for review.



After clicking the button to submit the form, the status bar will say "This form has been submitted" and the form will receive a green check mark. No further action is required for that form.

Submitting the Signed Ordinance (Form 4)

As mentioned before, the Ordinance of Appropriation and Tax Rate (Form 4) must be printed and submitted with actual signatures. Therefore, signature lines appear on the form but cannot be completed electronically. The form should be submitted through the "Submit Proof of Advertisements and Ordinance" section under the "Manage Unit" breadcrumb.



However, the unsigned version should also be submitted as described above, so that the DLGF receives an electronic copy of the ordinance.

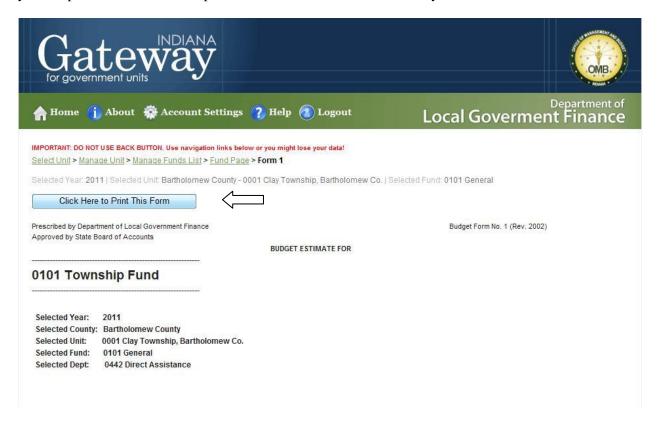
Submitting Proof of Advertisements

When providing proof of publishing to the DLGF, we recommend that you scan what is published in the newspaper OR request a PDF or other electronic copy of the published material from the newspaper and then upload. Follow the instructions as provided in this section of the budget process application.



Printing the Forms

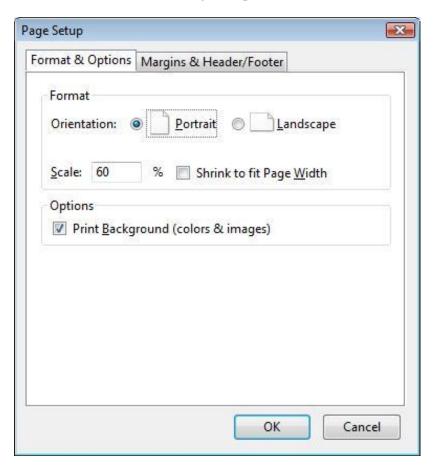
The DLGF strongly recommends that you retain a copy of the forms that have been submitted. Forms can be printed directly from Gateway. When you are in the form, there is a button that appears both at the top and bottom of the page that says "Click Here to Print This Form." You can print the forms on paper, or you can print them to a PDF or picture file and save them electronically.



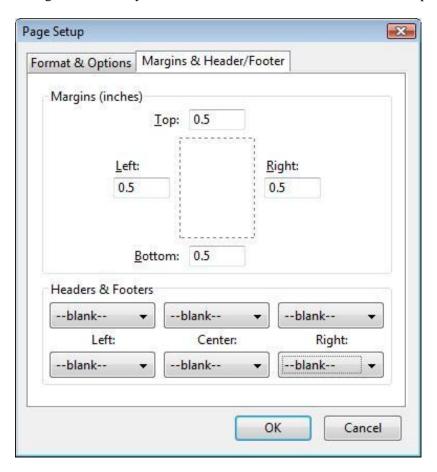
Mozilla Firefox

In order for the forms to print properly from your browser, the print settings may need to be adjusted.

Go to File > Print Preview > Page Setup.



In the Format & Options tab, you can change the format between Portrait and Landscape. You can also change the scale of the document to fit on one page. For instance, Form 4B prints on 2 pages by default. If you shrink the scale to approximately 60 percent, it will print on one page. Finally, check the "Print Background" box if you would like line items that are not used to display as grey boxes when printing.

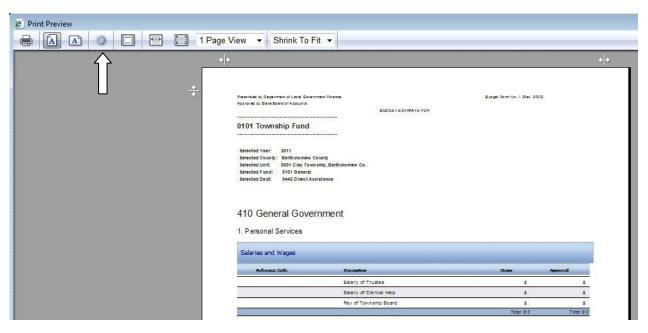


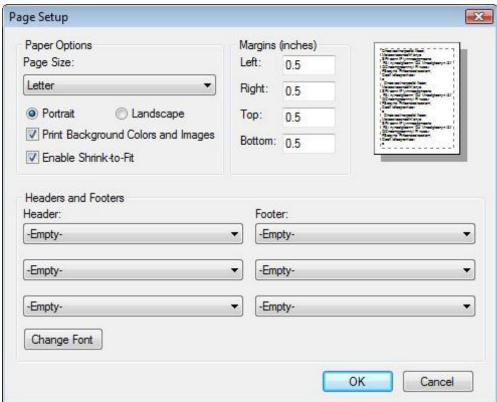
The Margins & Header/Footer tab allows you to choose what information you would like displayed on the print-out. You have the option to display date, time, number of pages, and URL if preferred. Otherwise, ensure that all drop-down boxes read as (--blank--). You may also adjust the margins to prevent data from being cut off on the right side of the page. However, this problem should be remedied by the Scale option in the Format & Options tab.

Internet Explorer

The interface looks a little bit different, but the process is similar.

Go to File > Print Preview. Click on the Page Setup icon found in the toolbar across the top of the page to bring up the dialogue box.





Where to Go for Help

The DLGF has a help line and e-mail address for Gateway inquiries. Should you encounter any issue or need further assistance, please send an e-mail to gateway@dlgf.in.gov. You may also consult the trouble shooting guide in the following section.

Trouble Shooting Guide

The website will not load on my computer.

This can result from a number of different factors. To identify the problem, first open a second browser and visit a different website (try http://google.com). If the second website will not load, then the problem is most likely with your own internet connection or network. Contact your internet provider to resolve the issue.

If the second website displays properly, then try retyping the website into your browser. The website is www.stats.indiana.edu/govtgateway.

On occasion, Gateway may be temporarily unavailable. Whenever this occurs, an e-mail will be sent to all users. Check your e-mail for any alerts that the website is unavailable. You will also be e-mailed when website availability returns.

If no such alerts have been sent and the website still will not appear on your screen, please contact our Gateway helpline.

The website is running slowly on my computer.

This can result from a number of different factors. To identify the problem, first open a second browser and visit a different website (try http://google.com). If the second website runs slowly, then the problem is most likely with your own internet connection or network. Contact your internet provider to resolve the issue.

If the second website runs at the normal speed, then the issue is most likely a high use volume of the Gateway. Peak usage will likely occur as the submission deadline approaches. The best way to avoid this problem is to submit the budget forms in advance of the November 1 deadline. However, peak usage times can also be avoided by completing the work outside of typical business hours (such as early in the morning or in the evening).

Website speed can also be improved by utilizing a faster internet connection. Since the forms are webbased, they can be completed at any computer with internet access.

I forgot my username.

Your username is simply your e-mail address (for example, auditor@county.gov or johndo@@yahoo.com). If you have multiple e-mail addresses and are unsure which one serves as your username, the most likely address is the same one at which you receive correspondence and memoranda from the DLGF. If this one does not work, you may continue trying different e-mail addresses until you find the correct one.

If you have never logged in before and your e-mail address does not log you in, it is possible that you have not yet been added as a user on the system. You may contact the Gateway helpline to request to be added to the system.

If you have logged in before and your e-mail address does not log you in now, please contact the Gateway helpline for further assistance.

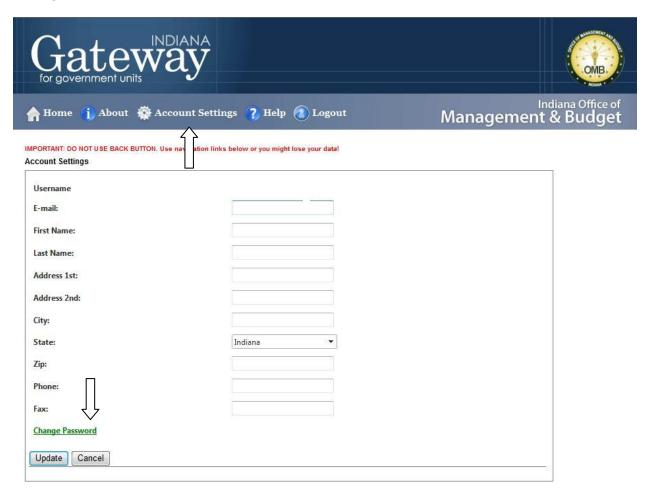
I forgot my password.

Passwords may be reset automatically through Gateway. On the login screen, click "Forgot your Password?"



You will need to enter your username (this is your e-mail address). If you have entered the incorrect username, the website will give you a message that says "We were unable to access your information. Please try again." For information about forgotten usernames, see the previous section.

If you enter the correct username, a new password will be sent to your e-mail address. If you do not receive an e-mail, check your spam or junk mail folder to ensure that the e-mail was not diverted there. Once you receive the temporary password, return to the login screen and log in using that password. Upon gaining access, immediately change your password by going to "Account Settings" and clicking the "Change Password" link.



You may want to write down the password for future reference.

I am trying to print the forms, but they are not coming out right.

The way your browser prints the form is controlled by the print settings of the browser. If you would like the forms to print with different formatting (for example, on fewer pages), the section of the Quick Starts guide entitled "Printing the Forms" contains instructions about print settings.

If the forms are printing with incorrect data, please view the form on the website and ensure that data has been entered accurately.

If data on the form is printing differently from what you see on the screen, please contact the Gateway helpline for assistance.

I do not know what numbers I am supposed to put in the form.

The DLGF has a manual for each unit type that gives detailed instructions about the content of the forms. These can be accessed at the following links.

- County: http://www.in.gov/dlgf/2677.htm
- Township: http://www.in.gov/dlgf/4952.htm
- Cities/Towns: http://www.in.gov/dlgf/4924.htm
- Schools: http://www.in.gov/dlgf/4873.htm
- Libraries: http://www.in.gov/dlgf/4843.htm
- Special Districts: http://www.in.gov/dlgf/4768.htm

For additional assistance, you may contact any of the following:

- Your financial consultant (if you have one)
- Your association (for example, Association of Indiana Counties or Indiana Association of Cities and Towns)
- Your DLGF budget field representative. To find your representative and his or her contact
 information, please visit
 http://www.in.gov/dlgf/files/Budget_Field_Staff_Assignments_and_Numbers.pdf.

When I log in, there is no unit for me to select.

If your unit is a school, the forms will not be available on the Gateway website until the 2013 budget year. You should submit your budget paperwork as you have for past years for the 2012 budget year.

If your unit is not a school, then our staff can assign your unit to your username within the system. Please contact gateway@dlgf.in.gov for assistance.

My Form 1 will not load.

The Form 1 requires one form per department. Therefore, in order to view and edit the Form 1, you must first select a department. If your unit has not added departments to the list under the "Manage Departments" link, no Form 1s will be available. Please go to the "Manage Departments" link and customize your unit's department list before trying to edit the forms.